

QuickBooks® Desktop for Windows: Updating Your Online Banking Connection

Your bank has updated to a new connection type to provide data to QuickBooks desktop. Going forward, you'll use a bank-hosted sign-in form to authorize downloads. The process for adding accounts and downloading is the same, but the screen you use to sign in to City Bank will look different.

For your security, City Bank may periodically request that you reauthorize your accounts by signing in again. This may happen every 90 days.

This guide will help you update your online banking connection to ensure uninterrupted downloads of your bank transactions.

Before You Begin

Before updating your connection, make sure you have:

- The latest version of QuickBooks installed
- A reliable internet connection
- Your bank login credentials
- A backup of your QuickBooks company file

Step 1: Prepare Your Company File

1. [Update QuickBooks to the latest release](#)
2. [Download transactions in online banking](#)
3. [Add/match them in QuickBooks](#)
4. [Create a backup of your company file](#)

Step 2: Turn Off Online Banking Services

1. Close the Downloaded Transactions window.
2. [Disconnect all related accounts](#)
3. Go to **Lists > Chart of Accounts**.
4. Right-click the account you want to turn off and select **Edit Account**.
5. Go to **Bank Settings** and select **Deactivate all online services**.
6. Select **OK**, then **Save & Close**.

Step 3: Set Up Online Banking Services

1. Sign in as the primary account owner with your Intuit account.

- a. Go to **Company > My Company** and select **Sign In** (top-right).
2. Complete the setup wizard: **Banking > Bank Feeds > Set Up Bank Feeds for an Account**.
3. Search for your bank and select it.
4. Enter your financial institution login credentials and click **Connect**.
5. Map your bank accounts to the corresponding QuickBooks accounts.

Step 4: Download Transactions

1. Go to **Banking > Downloaded Transactions**.
2. From QuickBooks Account, select the account you wish to download.
3. Select **Download**.

Note: You may need to review and categorize the previous day's transactions.

Troubleshooting & Tips

- If login fails, verify your bank credentials and try again.
- Ensure you are logged into QuickBooks as the primary account owner.
- Make sure your product is updated to the latest release before reconnecting.
- After reconnecting, review account mappings to ensure transactions post to the correct accounts.

Bill Pay Transition

Bill Pay through QuickBooks is ending.

- Any scheduled payments you already set up will still process.
- To schedule new payments in the future, you must use:
- Your bank's online Bill Pay service

Tip: Review any upcoming payments to make sure they are scheduled directly with your bank.

You're All Set!

Once you've completed these steps, your QuickBooks software will now be connected using the new connection. This new method ensures more secure, reliable, and faster updates for your accounts.